

2000 BALANCED SCORECARD - RICK WAUKDES MOINES

Scorecard Measure	Performance Area	Measurement	Threshold	Target	Superior	Performance Assessment									
						DN	MS	MM	MA	ES	CE				
Financial 40%	Profitability	⇒ Key Punch Loss Ratio Ex-Cat ⇒ Controllable Expenses on Budget	60% 5%	55% On Budget	50% Under Budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Growth	⇒ Total Premium Growth □ Specialty Growth (EPP, DFL, TIG) □ PLD Growth □ MRG Growth	7.80% 20% 16% 15%	9.80% 25% 18% 20%	11.80% 30% 22% 25%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		⇒ MVI (Roll in Replacement Business)	75%	80%	85%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Producer Management	⇒ Manage Community Bank Program Roll In	85% of Plan	90% Plan	100% Plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
External Processes 20%	Customer Management	⇒ Identification & Appointment of New Producers	1	2	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Producer Appointment	⇒ Renewal Retention X Poultry Desired Business	75%	85%	90%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Retention	⇒ New Renewal Issuance ⇒ Endorsement Issuance ⇒ Premium Collections - X-Surety	85% 75% 68 Days	90% 90% 60 Days	95% 95% 57 Days	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Service Performance	⇒ Staff Retention □ MA or better retention ⇒ Diversify Staff to Reflect Local Diversity ⇒ Balance Female/Male Band 4+	70% Plan Develop - Candidate List Plan - Identify Local Candidate	80% Consider Candidates for Openings Consider Candidates for Position	90% Hire Candidates for Branch Position Hire Candidates for Branch Position	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internal Processes 20%	Attract/Retain the Best	⇒ Developmental Agenda For All Direct Reports ⇒ Personal Dialogue Engagement With High Potential Employees In Branch	80% Good Feedback	90% Very Good Feedback	100% Clearly Exceeds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Building Future Leaders					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall Evaluation Score						0	25	50	100	150	200	145 pts			

Handwritten notes and signatures:

- 89.2
- 101
- Handwritten signature/initials
- Handwritten note: "Average 145 pts"